

WELLESLEY PUBLIC SCHOOLS

40 Kingsbury Street • Wellesley • Massachusetts 02481
781-446-6210

Dr. DAVID F. LUSSIER
Superintendent of Schools

Dr. Judith Malone Neville
Assistant Superintendent, Teaching and Learning

LORI V. CIMENO
Director of Student Services



JUDITH M. BELLIVEAU
Assistant Superintendent, Finance and Operations

KATHLEEN F. DOOLEY
Director of Technology

To: Interested Consultants

From: Judith M. Belliveau

Date: May 12, 2016

RE: Wellesley Public Schools Population/Enrollment Study and Forecasts

The Wellesley Public Schools, on behalf of the Wellesley School Committee and Wellesley Board of Selectmen, seeks quotes on or before May 25, 2016 from qualified consultants for a **Comprehensive Population and Enrollment Study and Forecast**. **These data will be used to assist the Town of Wellesley in its facilities and education planning for the future.**

The Wellesley Public Schools is a Pre-Kindergarten through Grade 12 municipal school district located in Wellesley, Massachusetts, an affluent suburb west of Boston with approximately 28,000 residents within 10.35 square miles. The District has seven elementary schools, one middle school and one high school, as well as an integrated pre-school. Total in-district enrollment, including pre-school, is 5,086. Attached is the enrollment report as of October 1, 2015 and projections charts generated internally by the District for the three years ending in FY19.

Of the total population, there were 15,900 registered voters as of 2016. The average assessed value of a single family home in fiscal year 2016 (July 1, 2015 through June 30, 2016) is \$1,180,993 and the average single family tax bill is \$13,971. The median assessment and tax bill for the same period is \$991,000 and \$11,724 respectively. The Town received \$9.2 million in net State Aid in FY16 and had \$8.8 million of Free Cash as certified at June 30, 2015. For additional information visit www.wellesleyma.gov www.wellesley.k12.ma.us and www.mass.gov/dor/local-officials/.

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Study Requirements:

The Town of Wellesley contracted with Symmes, Maini & McKee Associates of Cambridge, Massachusetts to develop a comprehensive conditions inventory of each of the Town's ten schools. This conditions assessment was the principal driver of a facilities master plan timeline to address the facilities needs across these buildings. With a newly constructed high school and a middle school that had received renovations in the recent past, the facilities master plan is primarily focused on the district's 7 elementary schools. Two of these schools—Sprague and Bates—were either renovated or rebuilt within the last 15 years and only need regular maintenance work. Fiske and Schofield are nearing the completion of extensive interior and exterior renovation work that will be completed in the summer of 2016. The three remaining elementary schools—Hardy, Hunnewell, and Upham—require the most extensive facilities work and the Town has examined a number of scenarios including school closure, consolidation, renovation, and new construction as part of its assessment to determine the best path forward. The District's education needs, forecasted number of students, and overall cost are critical variables in making a decision on how to proceed. To view Extensive documentation related to this work can be found at:

www.wellesleyma.gov/Pages/WellesleyMA_HHU/hhu_background

To be most useful, this enrollment study must take into account economic trends, local demographics, in and out migration both from the town and between the public schools and private schools, local housing stock, housing turnover, housing development and permits, District enrollment history, and any other pertinent data specific to the Town and the School District. Based on these data, the contractor is expected to develop a comprehensive population and enrollment study, with high and low enrollment projections for five- and ten-year periods as well as guidance for longer term planning beyond ten years. The study will provide both a district-wide analysis as well as individual school level analyses. Results must be made available in electronic format to the District for incorporation into presentations, website posting, etc.

The deadline for completion of the study is on or before August 31, 2016

Submission Requirements:

Proposal

In addition to the fee proposal described below, please provide a thorough description of the approach you will use for this study, the data you will require from the District/Town, the timeline and milestones for data gathering and presentations, and any other resources you will need to access. It's important to note that the Town expects multiple engagements/presentations throughout this work. Before the launch of the study, this will include meeting to explain the proposed methodology, to collaboratively sharpen data requests, and further refine overall expectations. Upon completion of the study, presentations to Town committees will be required to provide a detailed review of findings, forecasts, and suggested implications for Town planning. Your proposal must include sufficient information to demonstrate your capability, integrity, and reliability to perform the services that the Wellesley Public Schools has requested.

References

Please provide at least three school district references with the following information: Organization name, address, contact person who can attest to the performance of your firm and accuracy of your forecasts, and contact telephone number/email. It is preferable to have references in Massachusetts or the New England area, but not required. References should, if at all possible, be from a community of similar size and socioeconomic characteristics, for which your firm as provided a similar size and/or scope of services as requested by the Wellesley Public Schools.

Sample Study

Please include an actual report produced for another school district population/enrollment study, preferably of similar size and scope of work as the Wellesley Public Schools.

Fee

Please submit your fee proposal as a fixed amount for the Study plus anticipated expenses. Expenses will include all travel, administrative and other ancillary charges for the Study. The award of this contract will be based on the fixed fee proposed. Please also provide an hourly and/or daily rate for additional work that WPS may request.

Certification

Please include a statement with your signature certifying that you can meet the completion deadline of August 31, 2016.

The School Committee and Board of Selectmen will select the proposal with the lowest fee from a qualified ("responsible") consultant to perform the study requirements described in this Request for Quotes. The School Committee and Board of Selectmen may reject any quote proposal from a consultant that are deemed not qualified ("responsible"). The School Committee and Board of Selectmen also reserve the right to cancel this solicitation if it deems that the proposals are not in the best interest of the District.

A preliminary Statement of Interest in this project is due on or before 5:00 pm Wednesday, May 18, 2016. Complete proposals with price quotation would be due no later than 5:00 pm Wednesday, May 25, 2016 to:

Wellesley Public Schools
Attn: Business Office
40 Kingsbury Street
Wellesley, MA 02481

An electronic proposal may be sent directly to:

Judith M. Belliveau
Assistant Superintendent for Finance & Operations
jbelleveau@wellesleyma.gov